

## REVIEWER GUIDE TO IAM - INTERNET ASSISTED REVIEW (Formerly known as Asynchronous Electronic Discussions)

Thank you for agreeing to review NIH grant applications using IAM- Internet Assisted Review. While this review format eliminates the need to travel, it does introduce some additional challenges for participation. This guide will help you overcome many of these participatory challenges.

These instructions are intended to provide reviewers with an overview of the IAM site, to help them navigate the main functionalities needed to participate in an IAM review meeting, and review some important considerations regarding IAM meetings.

### IAM SITE OVERVIEW – BASIC SCREENS, NAVIGATION, AND FUNCTIONALITIES

**Logging in:** Before the meeting reviewers will receive an email (from the SRO for the meeting) providing the link to the meeting site. The site will be available only on the day of the meeting. To log into the site, click the link (or open a browser and copy and paste the link provided by the SRO). When the login page opens, add your user name (this is your eRA Commons user name) and the IAM password provided by the SRO. Then, click on the “Sign In” button.

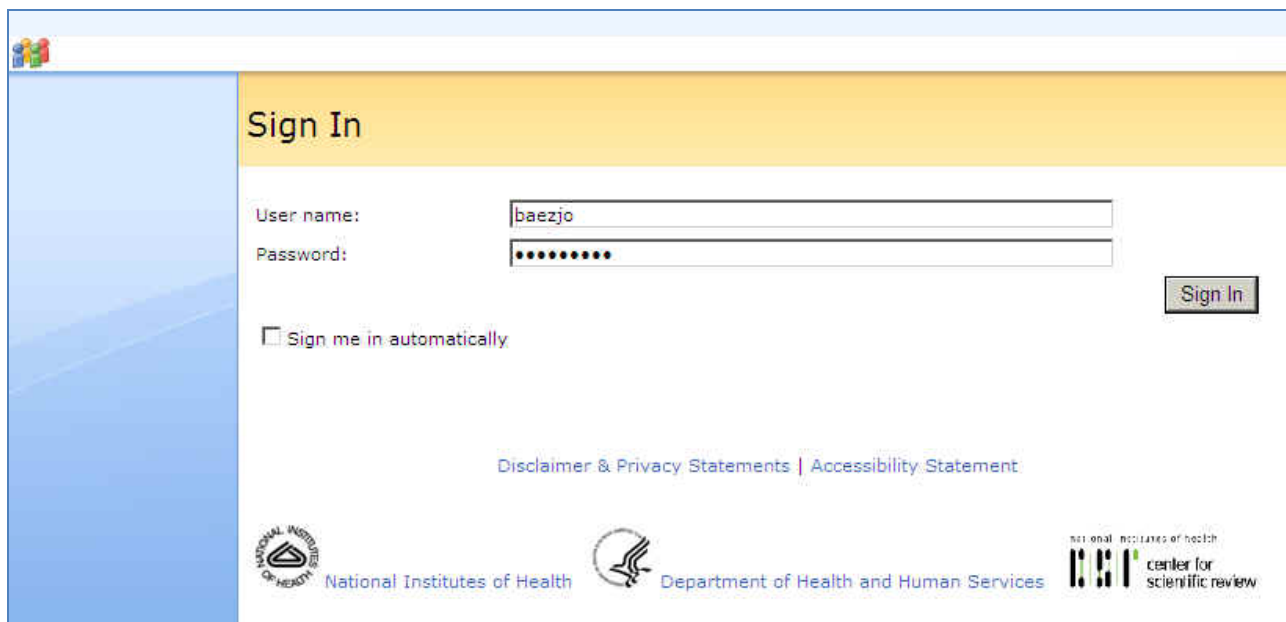


Figure 1 – Log in screen

Before reviewers are granted access to the meeting site you will see an ‘IAM Disclaimer Notice’. This is a reminder of the confidentiality of the meeting. It also states that no material should be saved, printed or disseminated in any format. If you accept these conditions, click on the “I Accept” button. Before the first screen listing the applications included in the review meeting opens, you will be asked if you want to close two windows, answer “Yes” to both questions.

**IAM Main screen** (Figure 2). This screen is central to the IAM review platform. It provides an overview of the meeting and allows users to navigate to other screens as well as send notes to the SRO. The following links are displayed for each application being reviewed:

- **Application number**
- **Applicant name**
- **Number of unread discussion threads**
- **Application status** (if an application is a candidate for being ‘Not Discussed’ this information will be displayed during the introduction phase.)

- **Object button.** During the introduction phase an Object button will be available if an application is a candidate for being 'Not Discussed'. If a reviewer clicks the 'Object button' the application will be discussed.
- **Reviewer role**
- **Score rank**

The main screen displays the SRO and Chair announcements, the phase of the meeting and links to the following areas of the IAM review platform:

- **Deadlines:** this shows the different phases of the meeting,
- **Links:** this shows the links that are important for the meeting.

The main screen also allows reviewers to read and send messages to the SRO using the links provided at the top of the screen.

**NATIONAL INSTITUTES OF HEALTH**  
center for scientific review

Internet Assisted Meeting

Welcome, hendrixji  
Messages: [None](#) [Logout](#) [Send Note to SRO](#)

**\*\* ZRG1 IAM-V4.1 TRAINING**

**Announcements**

Welcome baezjo | 1/6/2010 2:35:01 PM  
Welcome to this meeting. Thank you for participating in the review of these ten applications. I will be guiding the discussions of the applications. I am counting on your participation and intense discussions. I look forward...  
[more >>](#)

Welcome boundst | 1/6/2010 2:28:33 PM  
[All \(2\) Announcements](#)

**Phase**  
Introduction  
Ends: 1/06/10 14:45

**Additional**  
[Deadlines](#)  
[Links](#)  
[View Discussed Apps](#)

Application Number	PI Name	Unread	Total	Status	Object	Role	Prelim. Rank
<a href="#">1P31AED111111-01-705</a>	<a href="#">JEFFERSON, THOMAS</a>	0	0			Reviewer 2	1
<a href="#">1P31AED111111-01-704</a>	<a href="#">REAGAN, RONALD</a>	0	0				1
<a href="#">1P31AED111111-01-690</a>	<a href="#">LINCOLN, ABRAHAM</a>	0	0				3
<a href="#">1P31AED111111-01-695</a>	<a href="#">HOOVER, HERBERT</a>	0	0	Candidate	<a href="#">Object</a>		4
<a href="#">1P31AED111111-01</a>	<a href="#">WASHINGTON, GEORGE</a>	0	0	Candidate	<a href="#">Object</a>	Reviewer 1	4

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Government Made Easy

Figure 2 – Main Screen

**Objecting to Applications Being Designated as “Not Discussed”:** During the Introduction Phase, a reviewer can object to an application being designated as “Not Discussed”. To object, click on the “Object” button for the application (see the last two applications listed in Figure 2). A dialogue box appears explaining what ‘Object’ means and asking if you really want to discuss the application designated as “Not Discussed” [NOTE: designating an application as ‘Not Discussed’ is based on the preliminary average overall scores posted by the assigned reviewers (Figure 3)].

NATIONAL INSTITUTES OF HEALTH  
center for scientific review

Welcome, hendrixjl  
Messages: None

Internet Assisted Meeting

Logout  
Send Note to SRO

\*\* ZRG1 IAM-V4.1 TRAINING

**Announcements**

Welcome | baezjo | 1/6/2010 2:35:01 PM  
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**Phase**

Introduction  
Ends: 1/06/10 14:45

**Additional**

Deadlines  
Links  
View Discussed Apps

**Application Number**

IP31AED111111-01-705  
IP31AED111111-01-704  
IP31AED111111-01-690  
IP31AED111111-01-695  
IP31AED111111-01

REAGAN, RONALD  
LINCOLN, ABRAHAM  
HOOVER, HERBERT  
WASHINGTON, GEORGE

0 0  
0 0  
0 0  
0 0

Candidate  
Candidate

Object  
Object

Reviewer 2  
Reviewer 1

1  
1  
3  
4  
4

National Institutes of Health  
Department of Health and Human Services  
USA.gov  
Government Made Easy

Figure 3: Objection confirmation window

**Discussing applications:** When the discussion phase starts reviewers can choose to see a list of all applications or only those that are to be discussed by clicking on the button “View Discussed Apps” available in the center right of the main screen.

To start a discussion thread, click on the name of the PI or the application number displayed in the main screen. The application home screen will open (Figure 4). This screen will display:

- **Name of the applicant**
- **Application number**
- **Title of the application**
- **Status of the application** (the sentence “This application is being discussed” is displayed when an application is being discussed)
- **Application scores:** Criteria scores and overall impact scores given by the assigned reviewers are shown in the IAR Preliminary Scores Table. The Discussion Score column is reserved for reviewers to add current discussion score as an indication of their enthusiasm for the application as the discussion progresses. The final score column will be available for reviewers to add their final score during the final score phase. To add a discussion score or the final score for an application, use the dropdown menu. Note that the dropdown menu for final scores will be available only during the final scoring phase of the meeting.
- **Human subject/Vertebrate Animal and Budget:** For applications involving human subjects and/or vertebrate animals there will be links to the section where comments should be posted.

Main (\*\* ZRG1 IAM-V4.1 TRAINING) > Application Home [Logout](#)

**1P31AED111111-01-690 - LINCOLN, ABRAHAM**

**Project 1: AED Test 1**

This application is being discussed.

**Application Scores**

Reviewer Name	IAR Preliminary Scores						Disc. Score	Final Score
	Sig	Inv	Inn	App	Env	Ove		
guthriea (Rev1)	1	3	2	4	6	2		
havensr (Rev2)	1	3	2	4	6	2		
joplinj (Rev3)	1	3	2	4	6	3		
baezjo (Mail1)	1	3	2	4	6	2		
hendrixji							<input type="text"/>	
butterfieldp								
reviewerp								

**Open Discussions**

[Application Discussion](#)

[Animal Subject Discussion](#)

[Budget Discussion](#)

**Application Documents**

[Program Announcements \(PA07-030\)](#)

**Additional Documents**

**Application Discussion**

[Return to Top](#)

**Animal Subject Discussion**

[Return to Top](#)

**Budget Discussion**

[Return to Top](#)

**Post a New Application Comment**

[Post a New Application Comment](#)

**Post a New Animal Subject Comment**

[Post a New Animal Subject Comment](#)

**Post a New Budget Comment**

[Post a New Budget Comment](#)

Figure 4: Application panel – note links to application discussions, animal subject discussions and budget discussions

**Posting a comment:** To post a new discussion thread, click on the Application Discussion link, or scroll down the screen and click on the link “Post a new application comment” on the right of the screen (you can also post a reply to a comment posted by another reviewer). The IAM Text Editor will open in a new window allowing reviewers to enter text (Figure 5). In this window reviewers can add a subject for their thread and add an attachment and/or write comments. Due to security requirement this window can only be open for 20 minutes. A countdown clock is included to help reviewers to post their comments before the time expires. Once reviewers are satisfied with their comments they should click “Post” to have their comments available to other reviewers or click “Cancel” if they need to exit the screen without posting the comment.

Figure 6 shows an application panel containing posted comments. Note that for one of the comments there is no subject. If you were the reviewer and want to add the subject line, you should click on “Edit”, type in the subject of the thread you posted and make any correction you might find needed in the comment. Reviewers can also reply to a comment made by another reviewer hitting the “Reply” link next to a comment. This will open the IAM text editor to allow reviewers to include their reply comment

**\*\* ZRG1 IAM-V4.1 TRAINING - 1P31AED111111-01-705**

**Application Discussion - Post Comment: New**

Subject \*

Attachment

Message

\*The font size for the message should be no less than 3.  
If not so, please highlight the whole message body and then select 3 from the size dropdown box before saving it.

Your session will be end in:  
**19:35**

Figure 5: IAM Text Editor

Main (\*\* ZRG1 IAM-V4.1 TRAINING) > Application Home

**1P31AED111111-01-690 - LINCOLN, ABRAHAM**

**Project 1: AED Test 1**

This application is being discussed.

[Previous Application](#) | [Next Application](#)

[Logout](#)

**Application Scores**

Reviewer Name	IAR Preliminary Scores						Disc. Score	Final Score
	Sig	Inv	Inn	App	Env	Ove		
guthriea (Rev1)	1	3	2	4	6	2		
havensr (Rev2)	1	3	2	4	6	2		
joplinj (Rev3)	1	3	2	4	6	3		
baezjo (Mail1)	1	3	2	4	6	2		
hendrixji							<input type="text"/>	
butterfieldp								
reviewerp								

**Open Discussions**

[Application Discussion](#)  
[Animal Subject Discussion](#)  
[Budget Discussion](#)

**Application Documents**

[Program Announcements \(PA07-030\)](#)

**Additional Documents**

**Application Discussion** **Post a New Application Comment**

**Demonstration of the IAM Text Editor**

This is to demonstrate the reply.

hendrixji | 1/6/2010 2:47:16 PM | [Edit](#) | [Reply](#)

**Demonstration of the IAM Text Editor**

This is a short comment to demonstrate the IAM Text Editor.

hendrixji | 1/6/2010 2:46:49 PM | [Edit](#) | [Reply](#)

[Return to Top](#) [Post a New Application Comment](#)

Figure 6: Application Home showing discussion comments posted by reviewers.



### Posting Final Scores:

Reviewers are able to post discussion scores as the meeting progresses. Scores can be entered in the final score column only during the final scoring phase. During the final score phase reviewers are able to submit final scores based on the discussions posted in the site (Figure 7). To add final scores reviewers should click on the final score column and choose your score from the dropdown menu. Then, click “Save” to save the given score. Reviewers should add final scores for all discussed applications, including those they were not assigned to review. A link to help you navigate to the applications is included in the top right of the screen. Note that for applications designated as “Not Discussed”, ND will be automatically added as their final score.

Main (\*\* ZRG1 IAM-V4.1 TRAINING) > Application Home Logout

**1P31AED111111-01-705 - JEFFERSON, THOMAS**

**Project 4: AED Test 4**

This application is being discussed.

**Application Scores**

Reviewer Name	IAR Preliminary Scores						Disc. Score	Final Score
	Sig	Inv	Inn	App	Env	Ove		
butterfieldp (Rev1)	1	3	2	4	6	2		
hendrixji (Rev2)	1	3	2	4	6	2		
baezjo (Rev3)	1	3	2	4	6	2		
guthriea								
havensr								
joplinj								
reviewerp								

Save Cancel

**Application Discussion**

**Demonstration of the IAM Text Editor**

This is to demonstrate the reply function of the IAM text editor.

hendrixji | 1/6/2010 2:45:46 PM

**Demonstration of the IAM Text Editor**

This is a comment to demonstrate the use of the IAM text editor.

hendrixji | 1/6/2010 2:45:16 PM

**Open Discussions**  
[Application Discussion](#)  
[Budget Discussion](#)

**Application Documents**  
[Program Announcements \(PA07-030\)](#)

**Additional Documents**

**Next Application**  
JEFFERSON, THOMAS Go

Figure 7: Application home during final scoring phase. Note the dropdown available for the final score

**Navigating to other applications:** To navigate to another application reviewers can click the “Previous” or “Next Application” links at the top right of the screen. Reviewers can also highlight the PI name of the application using the dropdown list available at the top right of the screen and then hit “Go”.

**Sending a message to the SRO:** When reviewers need to send a message to the SRO without using email they can click on the link “Send Note to SRO” on the main IAM screen. When reviewers click on the link, a screen will open allowing a message to be entered in the note area. Messages written in this screen can be sent to the SRO by clicking the “Send” button.

**Reading notes sent by the SRO:** SROs can send notes to the entire panel or to individual reviewers. A link to these notes is displayed at the top left of the IAM main screen, below the Welcome containing the reviewer user name. To read these notes, click on the link.

## IMPORTANT CONSIDERATIONS:

- Because the discussions are asynchronous, spreading out your participation over the duration of the meeting ensures that discussions proceed to their natural conclusion. Please plan on logging in 5-6 times per day and to commit sufficient time to make a meaningful contribution. Spending 4-6 hours per day may be necessary.
- You are being asked to score every application and contribute to the best of your ability to all discussions in the meeting, not simply those applications specifically assigned to you. Passive listening is not possible in IAM, so reading the discussion threads for each application is important prior to final scoring. You should enter a final overall score for every application.
- The assigned reviewers should initiate the discussion for an application and provide sufficient introductory comments to bring all panel members up to speed on an application quickly.
- The Chair has responsibility for stimulating discussions and ensuring that the discussion threads are summarized adequately before final scoring.
- Access to the IAM meeting can be complicated by browser compatibility issues and security restrictions that might be in place between your institution and the NIH IAM servers. While all of the major browsers are supported, older versions may not work properly. The IAM Team strongly recommends: Internet Explorer 6+, Firefox 1.5+ (all platforms), Netscape 8.1+ (Windows), Netscape 7.2+ (Unix/Linux), Mozilla 1.7+, or Safari 2.0+
- For help with any technical issues, including logon and website problems please email the CSR IAM Support team directly at [csriamsupport@csr.nih.gov](mailto:csriamsupport@csr.nih.gov).

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Last revised 01/15/2010